Disruptive Demographics: Implications for the Delta Region





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OVERVIEW

Demographic Trends

Challenges & Opportunities

Discussion

CENSUS 2010 will REVEAL





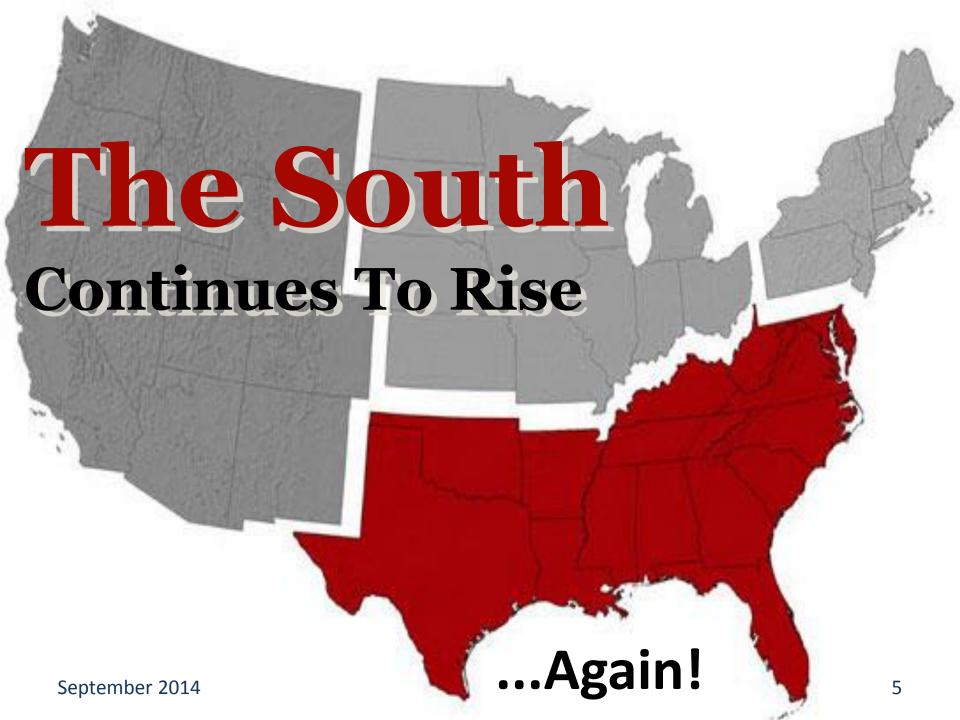
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6 DISRUPTIVE TRENDS

- The South Rises Again
- The Browning of America
- Marrying Out is "In"
- The Silver Tsunami is About Hit
- The End of Men?
- Cooling Water from Grandma's Well...
 and Grandpa's Too!

September 2014



South's Share of U.S. Net Population Growth, Selected Years, 1910-2010

Years	U.S. Absolute Population Change	South's Absolute Population Change	South's Share of Change
1910-1930	30,974,129	8,468,303	27%
1930-1950	28,123,138	9,339,455	33%
1950-1970	51,886,128	15,598,279	30%
1970-1990	45,497,947	22,650,563	50%
1990-2010	60,035,665	29,104,814	49%

U.S. POPULATION CHANGE BY REGION, 2000-2010

		Absolute Population	Percent Population
Region	2010 Population	Change, 2000-2010	Change, 2000-2010
U.S.	309,050,816	26,884,972	9.5%
Northeast	55,417,311	1,753,978	3.3%
Midwest	66,972,887	2,480,998	3.0%
South	114,555,744	14,318,924	14.3%
West	72,256,183	8,774,852	13.8%
Delta Region	9,852,807	126,435	1.3%

SHARES OF NET POPULATION GROWTH BY REGION, 2000-2010

Region	Absolute Population Change	Percent of Total
UNITED STATES	26,884,972	100.0
NORTHEAST	1,753,978	6.0
MIDWEST	2,480,998	9.0
SOUTH	14,318,924	53.0
WEST	8,774,852	32.0

NET MIGRATION TRENDS, 2000-2008

6729	Northeast	Midwest	South	West
Total	-1,032	-2,008	+2,287	+46
Black	-346	-71	+376	+41
Hispanic	-292	-109	+520	-117
Elderly	-115	+42	+97	-27
Foreign born	-147	-3	+145	+3

= Net Import

GROSS AND NET MIGRATION FOR THE SOUTH, 2004-2010

The Region

Domestic				
Years	- In	Out	Net	
2004-2007	4,125,096	3,470,431	654,665	
2007-2010	3,874,414	3,477,899	396,525	

Foreign					
- In	Out	Net			
268,619	132,382	136,237			
232,501	132,201	100,300			

Florida

	Domestic			
Years	In	Out	Net	
2004-2007	812,053	630,051	182,002	
2007-2010	654,931	668,087	-13,156	

Foreign					
In	Out	Net			
41,745	24,108	17,637			
33,095	32,094	1,001			

State Share of South's Net Growth, 2000-2010

Region/State	Absolute Change	State's Share
The South	14,318,924	100.0%
Texas	4,293,741	30.0%
Florida	2,818,932	19.7%
Georgia	1,501,200	10.5%
North Carolina	1,486,170	10.4%
Other Southern States	4,218,881	29.4%

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Absolute and Relative Population Change, 2000-2010

Area	Number of Counties /Parishes	2010 Population	Absolute Change 2000- 2010	Percent Change 2000- 2010
Delta Region	252	9,852,807	126,435	1.3%
Alabama	20	413,656	-22,181	-5.1%
Arkansas	42	1,431,528	28,075	2.0%
Illinois	16	344,594	-1,972	-0.6%
Kentucky	21	500,107	6,569	1.3%
Louisiana	56	3,324,911	-47,753	-1.4%
Mississippi	47	1,578,569	65,303	4.3%
Missouri	29	688,122	36,117	5.5%
Tennessee	21	1,562,650	62,848	4.2%

Delta Counties Experiencing Greater than 25,000 Absolute Growth, 2000-2010

County/Parish	2010 Population	Absolute Change 2000-2010	Percent Change 2000-2010
Desoto County, MS	161,252	54,053	50.4
Livingston Parish, LA	128,026	36,212	39.4
Ascension Parish, LA	107,215	30,588	39.9
Shelby County, TN	927,644	30,172	3.4
East Baton Rouge Parish, LA	440,171	27,319	6.6
Rankin County, MS	141,617	26,290	22.8

Delta Counties Experiencing 14,000 to 24,999 Absolute Growth, 2000-2010

County/Parish	2010 Population	Absolute Change 2000-2010	Percent Change 2000-2010
Pulaski County, AR	382,748	21,274	5.9
Madison County, MS	95,203	20,529	27.5
Tangipahoa Parish, LA	121,097	20,509	20.4
Lonoke County, AR	68,356	15,528	29.4
Craighead County, AR	96,443	14,295	17.4

Population Loss in the Delta Region, 2000-2010

Size of Loss	Number of Counties
Greater than 100,000	1
10,000 - 32,000	4
5,000 - 9,999	5
2,500 – 4,999	11
1,000- 2,499	49
Less than 1,000	60

U.S. POPULATION CHANGE BY REGION, 2010-2013

		Absolute Population	Percent Population
Region	2013 Population	Change, 2010-2013	Change, 2010-2013
U.S.	316,128,839	7,383,301	2.4%
Northeast	55,943,073	625,833	1.1%
Midwest	67,547,890	620,889	0.9%
South	118,383,453	3,827,709	3.3%
West	74,254,423	2,309,170	3.2%

SHARES OF NET POPULATION GROWTH BY REGION, 2010-2013

Region	Absolute Population Change	Percent of Total
UNITED STATES	7,383,301	100.0
NORTHEAST	625,833	8.5
MIDWEST	620,889	8.4
SOUTH	3,827,709	51.8
WEST	2,309,170	31.3

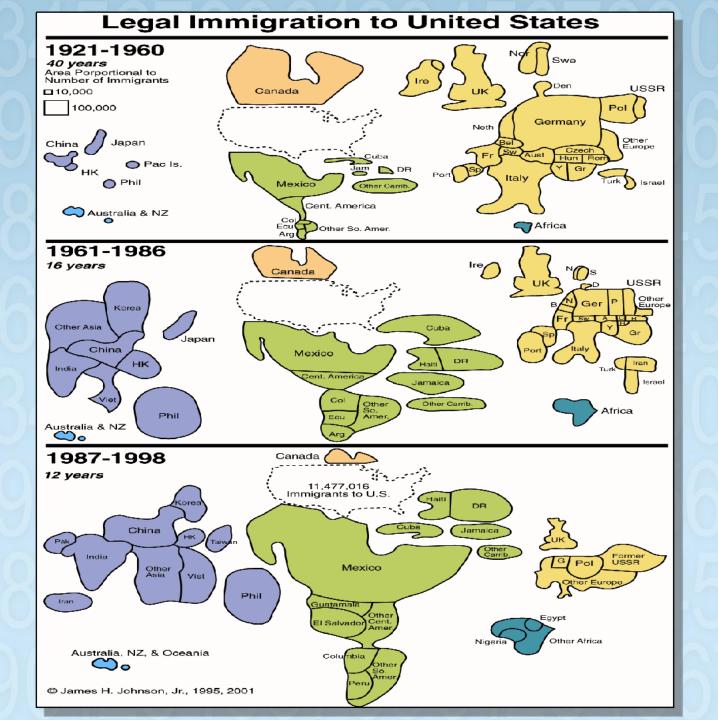
STATE SHARES OF SOUTH'S NET GROWTH, 2010-2013

Region/State	Absolute Change	State's Share
The South	3,525,554	100.0%
Texas	1,302,632	36.9%
Florida	751,550	21.3%
Georgia	304,514	8.6%
North Carolina	312,577	8.9%
Virginia	259,381	7.4%
Other Southern States	594,873	16.9%

THE "BROWNING" **OF AMERICA**

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The Numbers

Legal Immigrants

Year	Annual
	Flow
1920-1961	206,000
1961-1992	561,000
1993-1998	800,654
1999-2004	879,400
2005-2008	1,137,000
2009-2012	1,067,000

Refugees, Parolees, Asylees

Year	Annual Flow
1961-1993	65,000
1994-1998	107,000
1999-2004	85,500
2005-2008	75,000
2009-2012	92,500

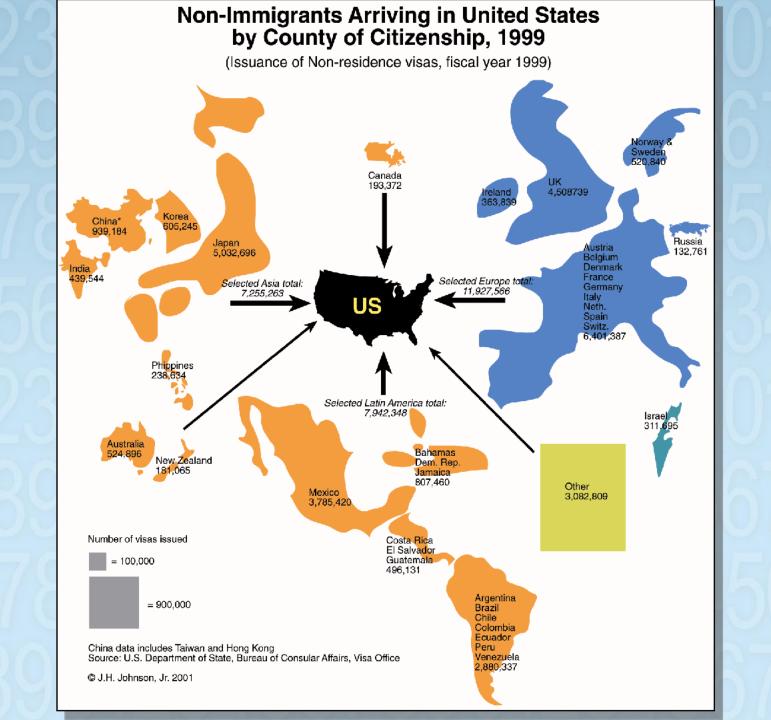
The Numbers Cont'd

Illegal Immigrants

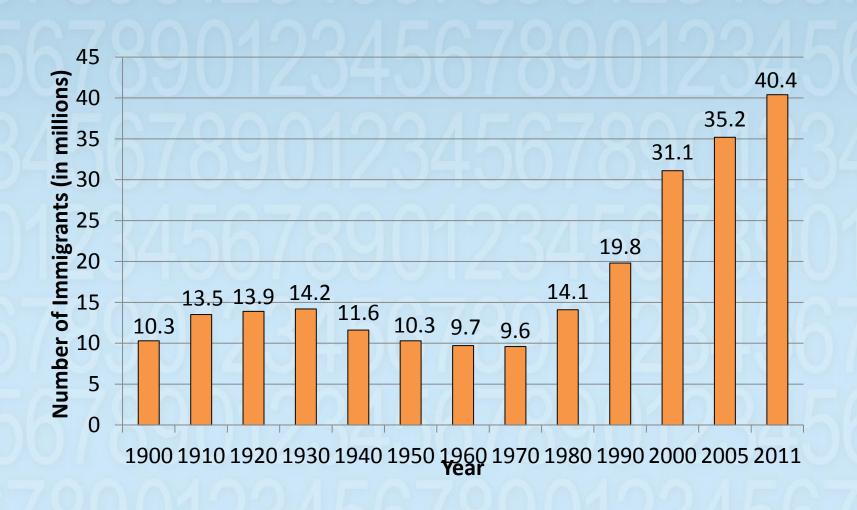
- 300,000 to 400,000 annually over the past two decades
- Three million granted amnesty in 1986
- 2.7 million illegal immigrants remained after 1986 reforms
- October 1996: INS estimated there were 5 million illegal immigrants in U.S.
- Since August 2005: Estimates of illegal population have ranged between 7 million and 15 million
- Today: An estimated 11.5 million unauthorized immigrants reside in U.S.

NON-IMMIGRANTS ADMITTED TO UNITED STATES, SELECTED YEARS, 1981-2011

Year	All Classes	Exchange Visitors	Academic & Vocational Students
1981	11,756,903	108,023 (1%)	271,861 (2%)
1985	9,539,880	141,213 (1%)	285,496 (3%)
1990	17,574,055	214,644 (1%)	355,207 (2%)
1995	22,640,540	241,364 (1%)	395,480 (2%)
2000	33,690,082	351,743 (1%)	699,953 (2%)
2001	32,824,088	389,435 (1%)	741,921 (2%)
2002	27,907,139	370,176 (1%)	687,506 (2%)
2008	39,381,928	506,138 (1%)	917,373 (2%)
2011	53,082,286	526, 931 (1%)	1,702,730 (3%)



U.S. Immigrant Population, 1900-2011



U.S. Foreign Born Population by Race/Ethnicity, 2011

Race/Ethnicity	Foreign Population	Share of Total (%)
Total	40,381,574	100.0
Hispanic	18,788,300	46.5
White Alone, not Hispanic	7,608,236	18.8
Black Alone, not Hispanic	3,130,348	7.8
Asian Alone, not Hispanic	9,988,159	24.7
Other Alone, not Hispanic	866,531	2.1

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U.S. POPULATION CHANGE BY RACE & ETHNICITY, 2000-2010

Race	2010 Population	Absolute Change 2000 – 2010	Percentage Change 2000 - 2010
Total	308,745,538	27,323,632	9.7%
Non-Hispanic	258,267,944	12,151,856	4.9%
White	196,817,552	2,264,778	1.2%
Black	37,685,848	3,738,011	11.0%
AI/AN	2,247,098	178,215	8.6%
Asian	14,465,124	4,341,955	42.9%
NH/PI	481,576	128,067	36.2%
2 or More Races	5,966,481	1,364,335	29.6%
Hispanic	50,477,594	15,171,776	43.0%

NON-WHITE AND HISPANIC SHARES OF POPULATION GROWTH, 2000-2010

Area	Absolute Population Change	Non-White Share	Hispanic Share
US	27,323,632	91.7	55.5
South	14,318,924	79.6	46.4
Texas	4,293,741	89.2	65.0
Florida	2,818,932	84.9	54.7
Georgia	1,501,206	81.0	27.9
NC	1,486,170	61.2	28.3

MEDIAN AGE OF U.S. POPULATION BY RACE, HISPANIC ORIGIN & GENDER, 2009

Race	Total	Male Fer	male
United States	36.8	35.4	38.2
White Alone	38.3	37.0	39.6
White, Non-Hispanic	41.2	39.9	42.6
Black Alone	31.3	29.4	33.3
Al/AN Alone	29.5	29.0	30.2
Asian Alone	33.6	32.6	34.6
NH/PI Alone	29.9	29.5	30.3
Two or More Races	19.7	18.9	20.5
Hispanic	27.4	27.4	27.5

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TOTAL FERTILITY RATES FOR U.S. WOMEN BY RACE/ETHNICITY, 2012

Race/Ethnicity Total Fertility I	Rate
All Races	1.88
Hispanic	2.18
Non-Hispanic White	1.76
Blacks	1.90
Asian	1.77
Native American	1.35

RELATIVE DISTRIBUTION OF U.S. BIRTHS BY RACE / ETHNICITY

Race/I	Ethnicity	1990	2008	2011
White		66%	50%	49.6%
Blacks		17%	16%	15.0%
Hispanics		15%	26%	26.0%
Other		2%	8%	9.4%

Source: Johnson and Lichter (2010); Tavernise (2011).

RELATIVE DISTRIBUTION OF U.S. POPULATION BY RACE / ETHNICITY

Race/Ethnicity	2005	2050
White	67%	47%
Blacks	12.8%	13%
Hispanics	14%	29%
Asian	5%	9%

POPULATION CHANGE BY RACE & ETHNICITY, Delta Region, 2000-2010

Race	2010 Population	Absolute Change 2000 – 2010	Percentage Change 2000 – 2010
Total	9,852,807	126,435	1.3%
Non-Hispanic	9,518,391	-33,220	-0.3%
White	6,098,741	-171,829	-2.4%
Black	3,134,796	67,015	2.2%
AI/AN	35,081	3,351	10.6%
Asian	114,113	29,073	34.2%
NH/PI	2,841	763	36.7%
Some other Race	9,359	2,368	33.9%
2 or More Races	113,460	35,157	44.9%
Hispanic	344,416	159,655	86.4%

Percent Change in Population by Race/Ethnicity, 2000-2010

Area	Total Population	Non-Hispanic White Population	Non-White Population	Hispanic Population
Delta Region	1.3%	-2.7%	8.6%	86.4%
Alabama	-5.1%	-9.0%	-1.8%	78.4%
Arkansas	2.0%	-2.6%	13.9%	101.9%
Illinois	-0.6%	-2.5%	15.8%	59.1%
Kentucky	1.3%	-0.3%	13.2%	63.6%
Louisiana	-1.4%	-4.8%	3.6%	71.6%
Mississippi	4.3%	-0.3%	9.4%	111.3%
Missouri	5.5%	3.8%	28.3%	76.0%
Tennessee	4,2%	-4.8%	17.0%	113.1%

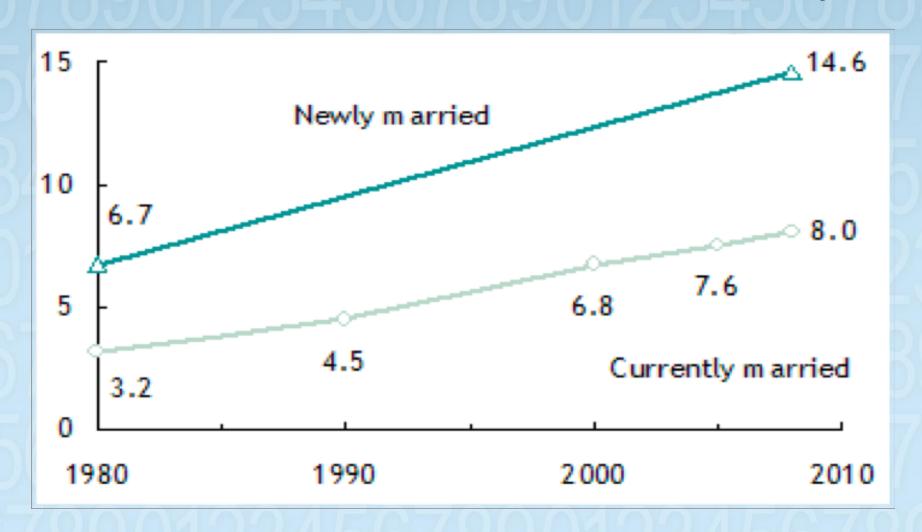
MEDIAN AGE AND FERTILITY RATES FOR FEMALES IN SOUTH, 2005-2010

Demographic Group	Median Age	Fertility/1000 Women
All Women	37.7	58
White, Non-Hispanic	42.8	50
African American	30.0	61
American Indian & Native Alaskan	33.5	65
Asian	34.6	63
Native Hawaiian & Pacific Islander	28.7	77
Some Other Race	26.7	88
Two Or More Races	19.6	59
Hispanic	28.3	80
Native Born	37.4	55
Foreign Born	40.4	79



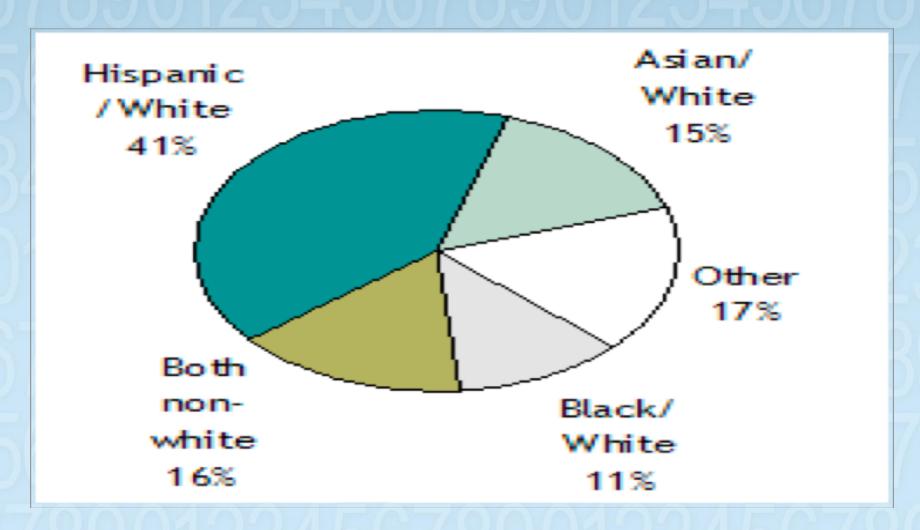
INTERMARRIAGE TREND, 1980-2008

% Married Someone of a Different Race/Ethnicity



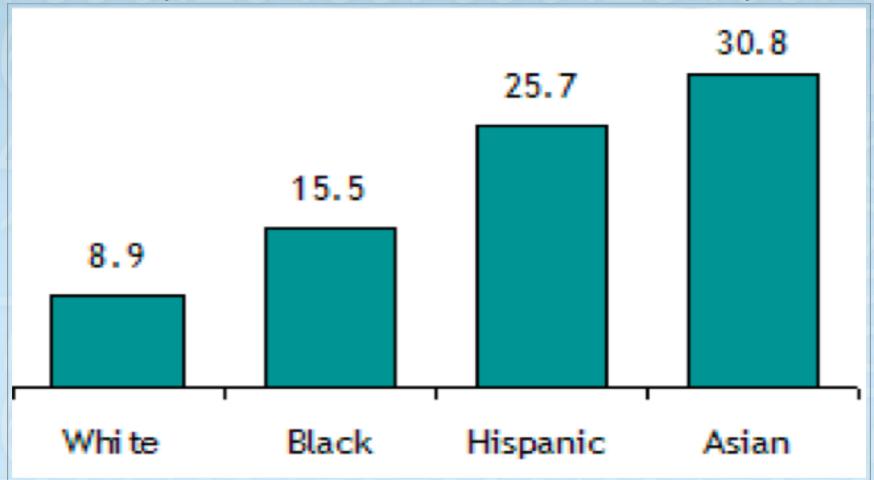
INTERMARRIAGE TYPES

Newly Married Couples in 2008



INTERMARRIAGE RATES BY RACE & ETHNICITY

% of Newlyweds Who Married Someone of a Different Race/Ethnicity, 2008







U.S. POPULATION CHANGE BY AGE, 2000-2009

	Age	2009	Absolute Change 2000 - 2009	Percentage Change 2000 - 2009
	<25	104,960,250	5,258,492	5.3
M	25-44	84,096,278	-1,898,345	-2.2
	45-64	79,379,439	16,977,567	27.2
	65+	39,570,590	4,496,886	12.8
Å	TOTAL	307,006,550	24,834,593	8.8

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U.S. POPULATION TURNING 50, 55, 62, AND 65 YEARS OF AGE, (2007-2015)

	Age 50	Age 55	Age 62	Age 65
Average Number/Day	12,344	11,541	9,221	8,032
Average Number/Minute	8.6	8.0	6.4	5.6

THE GREYING OF AMERICA U.S. Census Projections



September 2014 S. CENSUS REPORT "65+ IN THE UNITED SATES: 20043"

ABSOLUTE AND PERCENT CHANGE IN U.S. POPULATION BY AGE

Age	2005	2050	% Change
Total	296	438	50.0
0-17	73	102	39.7
18-64	186	255	37.1
65+	37	81	118.9

OLDER WORKERS IN U.S. WORKFORCE

YEAR 3456	Age 65 or Older	Age 75 or Older
1998	11.9%	4.7%
2008	16.8%	7.3%

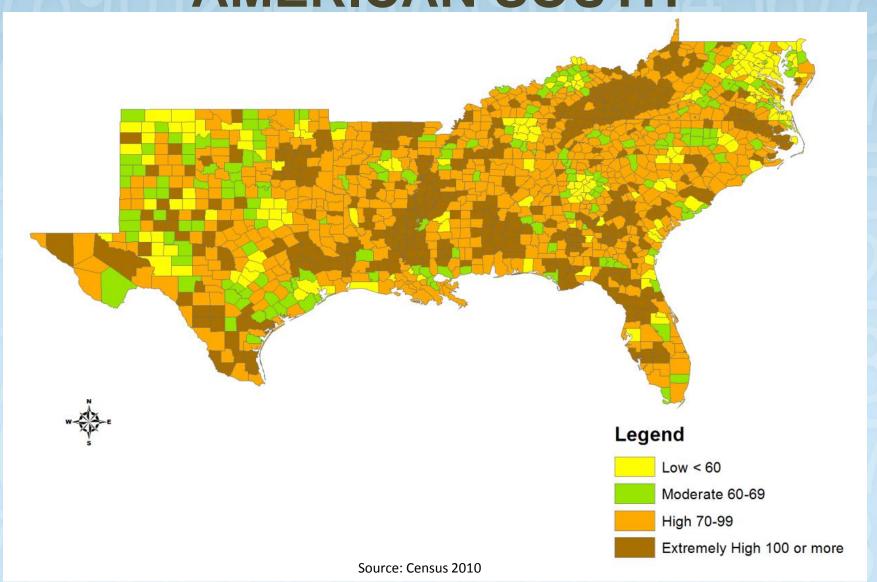
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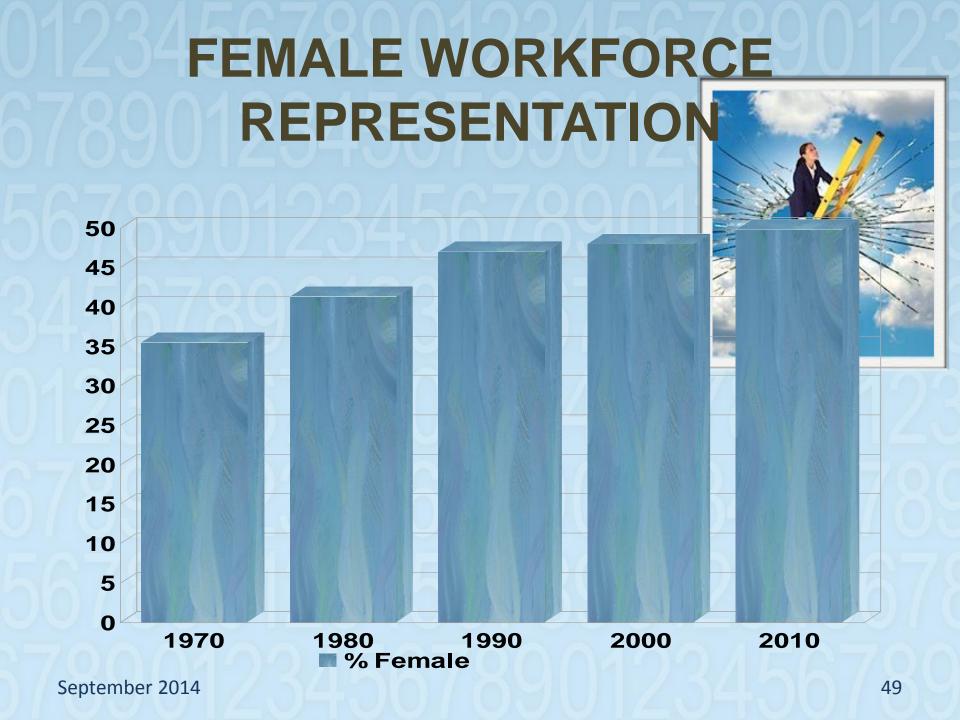
ABSOLUTE POPULATION CHANGE BY AGE, Delta Region, 2000-2010

	2010	Absolute Change	Percent Change
Age	Population	2000-2010	2000-2010
All Ages	9,852,807	126,435	1.3%
<25	3,396,750	-180,959	-5.1%
25-44	2,525,040	-242,190	-8.8%
45-64	2,612,619	469,543	21.9%
65+	1,318,398	80,041	6.5%

DEPENDENCY RATIOS IN THE AMERICAN SOUTH







The Plight of Men

- Today, three times as many men of working age do not work at all compared to 1969.
- Selective male withdrawal from labor market—rising nonemployment due largely to skills mismatches, disabilities & incarceration.
- The percentage of prime-aged men receiving disability insurance doubled between 1970 (2.4%) and 2009 (4.8%).
- Since 1969 median wage of the American male has declined by almost \$13,000 after accounting for inflation.
- After peaking in 1977, male college completion rates have barely changed over the past 35 years.

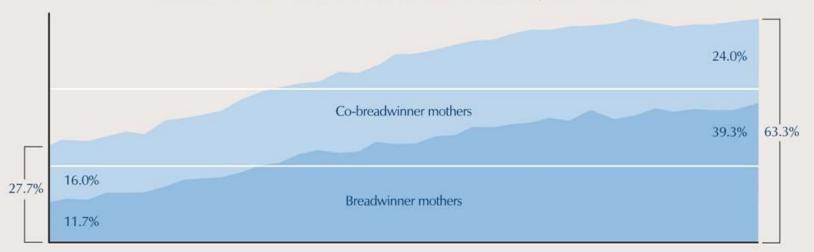
COLLEGE CLASS OF 2010

DEGREE	MALE	FEMALE	DIFFERENCE
Associate's	293,000	486,000	193,000
Bachelor's	702,000	946,000	244,000
Master's	257,000	391,000	134,000
Professional	46,800	46,400	-400
Doctor's	31,500	32,900	1,400
TOTAL	1,330,300	1,902,300	572,000

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Figure 6

THE NEW WORKFORCE: SHARE OF MOTHERS WHO ARE BREADWINNERS OR CO-BREADWINNERS, 1967 TO 2008



1967 1969 1971 1973 1975 1977 1979 1981 1983 1985 1987 1989 1991 1993 1995 1997 1999 2001 2003 2005 2007

Source: The Shriver Report, "A Woman's Nation Changes Everything," 2009

Source: Heather Boushey and Jeff Chapman's analysis of Miriam King, Steven Ruggles, Trent Akexander, Donna Leicach, and Mattherw Sobek. Intergrated Public Use Microdata Series, Current Population Survey: Version 2.0 (Machine-readable database). Minneapolis, MN: Minnesota Population Center (producer and distributor), 2009

Notes: Breadwinner mothers include single mothers who work and married mothers who earn as much or more than their husbands. Co-breadwinners are wives who bring home at least 25 percent of the couples' earnings, but less than half. The data only includes families with a mother who is between the ages of 18 and 60 and who has children under age 18 living with her.

Jobs Lost/Gained by Gender During 2007 (Q4) – 2009 (Q3) Recession

Industry	Women	Men
Construction	-106,000	-1,300,000
Manufacturing	-106,000	-1,900,000
Healthcare	+451,800	+118,100
Government	+176,000	+12,000
Total	-1,700,000	-4,700,000

Cooling Waters From Grandma's Well

And Grandpa's Too!

Children Living in Non-Grandparent and Grandparent Households, 2001-2010

Household Type	Absolute Number 2010	Absolute Change 2001-2010	Percent Change 2001-2010
All	74,718	2,712	3.8
No Grandparents	67,209	917	1.4
Both Grandparents	2,610	771	41.9
Grandmother Only	1,922	164	9.3
Grandfather Only	318	71	28.7

Children Living in Non-Grandparent and Grandparent-Headed Households by Presence of Parents, 2010

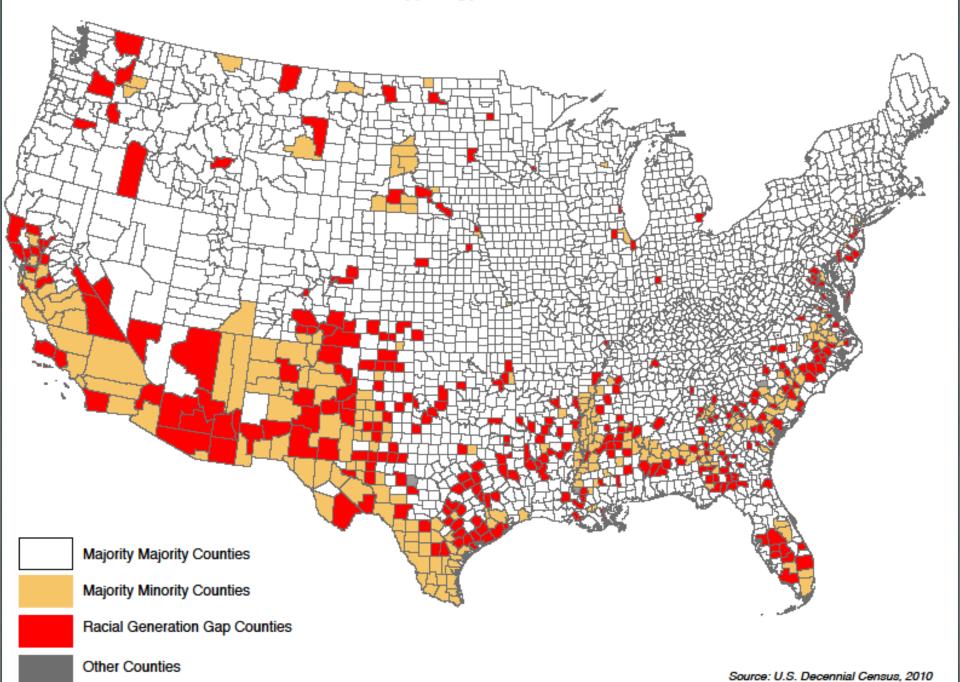
Household Type	All Children (in thousands)	Living with Both Parents	Living with Mother Only	Living with Father Only	Living with Neither parent
All	74,718	69.3%	23.1%	3.4%	4.0%
No Grandparents	67,209	73.4%	21.2%	3.3%	2.1%
Both Grandparents	2,610	18.1%	40.6%	5.2%	36.1%
Grandmother Only	1,922	13.8%	48.4%	4.5%	33.2%
Grandfather Only	318	26.4%	45.9%	4.4%	23.6%



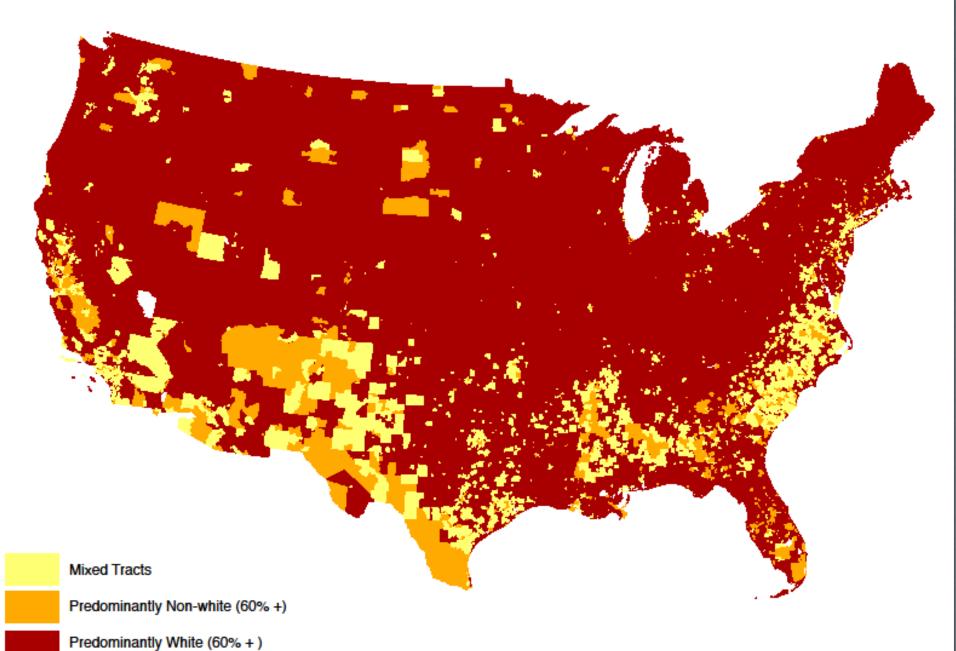
The Triple Whammy of Geographical Disadvantage

The Human Capital Challenge

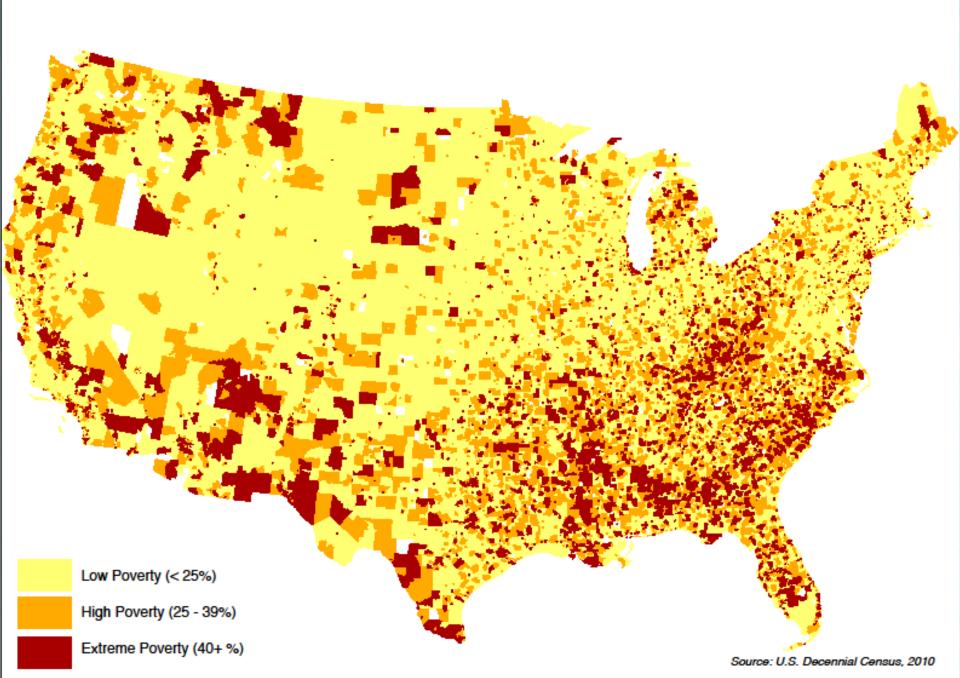
Racial Typology of U.S. Counties

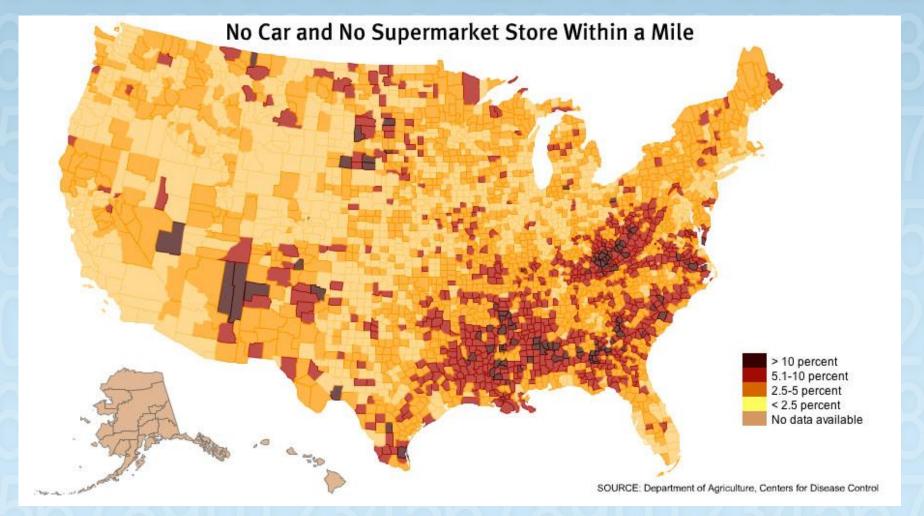


U.S. Racial Segregation by Census Tract, 2010



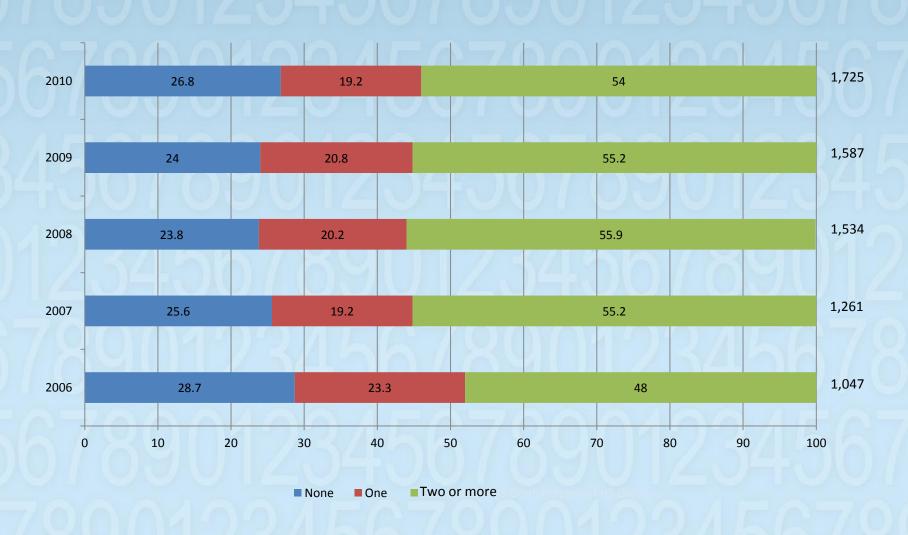
U.S. School Age Poverty Rate by Census Tract, 2010







Percent of High School Graduates Requiring Remedial Course Work



BACHELOR'S DEGREE HOLDERS (UNDER AGE 25) WHO WERE JOBLESS OR UNDEREMPLOYED

Year	Percent
2000	41.0
2011	53.6

CHANGE IN INCIDENCE OF POVERTY BY EDUCATIONAL ATTAINMENT IN NC, 2005-2007, 2008-2010

Educational			Percent
Attainment	2005-2007	2008-2010	Change
Less than High School	253,304	276,757	9.3%
High School Graduate	216,667	234,371	8.2%
Some College, Associate Degree	136,185	186,834	37.2%
Bachelor's degree or higher	49,082	57,919	18.0%

Source: American Community Survey

THE COMPETITIVE TOOL KIT

- Analytical Reasoning
- Entrepreneurial Acumen
- Contextual Intelligence
- Soft Skills/Cultural Elasticity
- Agility and Flexibility

MOVING FORWARD

- Rebrand the Delta Region as sustainable places to live and do business
- Improve Male Education Outcomes
- Augment efforts to recruit plants with strategies to recruit people
- Embrace immigrants
- Recognize demographic-driven business development & job creation opportunities

Implications for Workforce Planning and Development

- Managing transition from the "graying" to the "browning" of America.
- Competition for talent will be fierce and global.
- Successful recruitment and retention will hinge on your ability to effectively manage the full nexus of "diversity" issues.

IMPLICATIONS FOR BUSINESS

- Emergence of global care economy
- Adjustments for aging consumers
- Succession Planning
- Female-Dominated Labor Force and Leadership
- Free Agency Rules

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The Elder Care **Economy**

Age-Related Challenges

- Mobility Limitations
- Hearing Loss
- Vision Impairments
- Mental Disorders
- Substance Abuse Issues
- Chronic Disabilities
- Economic Constraints

The Triple Whammy

- Aging Boomers Face Mortality
- Elder Care Responsibilities
- Raising Grandchildren

OPPORTUNITIES

 Cater products & Labeling to emerging Groups

Design & package products with equality in mind

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LABELING & PACKAGING

- Easy to Read
- Easy to Understand
- Easy to Carry
- Easy to Enjoy
- Safer to Use

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DEFINITION OF EASY TO CARRY: CURRENT VS. FUTURE

Current Population	Future Grey Population		
Bulky and Heavy	Minimal Unit Size and Weight		
Big-sized cart, shopping cart, car trunk	Compact car, Rolling carriage		
Price Sensitive	Weight Sensitive		
Aesthetics Is More Important	Function Is More Important		
Mostly carry with one hand	Handle with both hands		

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SMART SLIPPERS



GLOWCAPS





SENIOR PLAYGROUNDS





SENIOR PLAYGROUNDS





The Freelance **Economy**

DRIVERS

- Broadband Technology
- Cloud Computing
- Other Technological Innovations
- Disruptive Demographics
- Global Economic Recession

The Online Market Place

- Guru.com
- Elance.com
- Odesk.com
- Freelancer.com

The Freelancer Economy—Technology

- Websites & Ecommerce (42,084)
- Programming and Databases (47,749)
- Engineering & CAD (10,463)
- Networking & Telephone Systems (10, 154)
- ERP & CRM (2,288)

The Freelancer Economy—Creative Arts

- Graphic Design & Multimedia (32,289)
- Writing, Editing, & Translation (45,510)
- Illustration & Art (11,451)
- Photography & Videography (7,399)
- Fashion & Interior Designs (2,746)
- Broadcasting (4,806)

The Freelancers Economy—Business

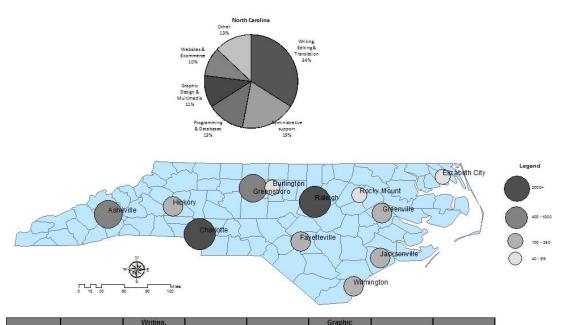
- Administrative Support (36,504)
- Marketing & Communications (8,187)
- Sales & Telemarketing (4,167)
- Business Consulting (11,887)
- Legal (2,567)
- Finance & Accounting (4,657)

Top Freelancer Locations

United States (200,619)	Australia (3,307)
India (60,212)	Bangladesh (2,694)
United Kingdom (10,387)	Romania (2,494)
Canada (9,133)	Indonesia (2,332)
Pakistan (7,731)	Russian Federation (2,223)
Philippines (5,221)	Uruguay (1,847)

September 2012

DISTRIBUTION OF FREELANCE ENTREPRENEURS



Area	Total Number of Freelancers	Writing, Editing & Translation	Administrative support	Programming & Databases	Graphic Design & Multimedia	Websites & Ecommerce	Other
North Carolina	6,435	34%	19%	13%	11%	10%	13%
Raleigh- Durham	2,230	17%	17%	16%	10%	10%	30%
Charlotte	2,247	14%	16%	11%	11%	8%	40%
Asheville	465	26%	16%	10%	8%	13%	27%
Burlington	71	27%	30%	7%	6%	7%	23%
Fayetteville	210	21%	29%	9%	11%	9%	24%
Greensboro	889	20%	18%	12%	13%	9%	28%
Hickory	154	17%	26%	10%	10%	12%	25%
Jacksonville	155	17%	31%	5%	12%	6%	29%
Greenville	110	17%	32%	14%	12%	5%	20%
Wilminaton	244	25%	18%	7%	12%	9%	29%
Elizabeth City	46	17%	35%	9%	7%	15%	17%
Rocky Mount	88	24%	31%	9%	10%	9%	17%

Freelancers within 30 mile radius of Zip: 27514 (N= 1,578)

Programming & Databases (287)	Illustration & Art (50)
Writing, Editing & Translation (281)	Photography & Videography (41)
Administrative Support (217)	Sales & Marketing (26)
Website & Ecommerce (153)	Broadcasting (25)
Graphic Design & Multimedia (148)	Finance & Accounting (22)
Business Consulting (101)	Legal (18)
Networking & Telephone Systems (76)	ERP & CRM (14)
Engineering & CAD (57)	Fashion & Interior Design (8)
Marketing & Communications (54)	

THE END

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